Conversation Checklist

Here is what you can do to prepare:

☐ Schedule the meeting(s)

Invite members of the leadership / transformation team and representative members from the student success team. Ideally, the conversation will occur 2-4 weeks after the ITA completion – this allows participants adequate time to review and reflect on their results, but not so much time that they don't remember the survey.

For the meeting, allocate enough time to review ITA outputs and to discuss next steps. Institutional styles vary – some groups meet once for four to five hours and some break their discussions into three or four meetings of two hours each. The institutional lead can help with the time allocation.

Remember to reserve a large enough meeting space, order food or snacks, and make sure there's a projector in the room to display the results.

☐ Review the ITA results

You have access to the full set of ITA results via the dashboards on the Gardner Institute Platform. Set aside time to familiarize yourself with the dashboards and understand the results. Previous facilitators recommended 10-20 hours. You may want to review the dashboards with the institutional lead(s).

Some facilitators discuss strengths – and what elements make the strengths such – areas of opportunity (lower rated areas). The institutional lead(s) can review the individual and group results and share thoughts on both. In addition to the ITA results, you may also integrate any other metrics or resources you or the institution regularly use (strategic plans, major student success grants, student success dashboards).

☐ Consider the following questions:

- Which areas got rated highest by the group? Lowest? Does this align with your expectations?
- Compare average results from the transformation / leader team with the student success community. Are the results aligned? Are there areas of disagreement between the two groups?
- What questions have the greatest variance in response?
- Did role or subject matter knowledge impact how participants answered?
- Are there areas with a lot of "I don't know"or "Not applicable" answers? What does this tell you

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☐ **Create an artifact**

The teams find it helpful to have a workbook or other artifact that is built on dashboards or other data. This workbook can help lend structure to the conversation by giving the team something to reference and serving as a physical reminder of each ITA capacity area. The content and design is up to you and the institutional lead. You may want to incorporate other information and data to further support reflection with the group.

☐ **Prepare for and facilitate the meeting**

Share the meeting agenda with participants in advance. Include the following types of information:

- Meeting purpose and objectives
- Reminders of how to access their individual dashboards in the Gardner Institute Platform
- Timeline for discussion

☐ **Encourage commitment**

- Record results of the conversation to share back with the institutional lead.
- Encourage the team to reflect on the process and plan for the future.
- Capture next steps following the Sensemaking discussion.